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AUTHOR Heitzeg, Howard T.
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ABSTRACT

This narrative about new and old technologies in communicating school election issues to the voting public discusses desktop publishing, word processing, television tapes, and public opinion sampling techniques. Groundwork involves understanding how campaigns are organized to determine appropriate application of technology to strategies and to seek out and identify as many potential "yes" voters as possible and get them to the polls. Though research shows that adults with children attending school are supporters of school bond issues, statistics also prove that these parents often are not registered to vote. Data processing technology can solve half of the problem by using a file with parents' names, addresses, and children in school. The entire job is accomplished if a file of all registered voters is obtained. This voter list can be further refined by tracking voting history among traditional school supporters. Teams tracking voters can form a strategy enhanced by a television tape that will explain to these election workers the need for the election and what the schools plan to do with the funds they are seeking. Workers should use cards of each voter's history, mail information to "yes" and "undecided" citizens, and call the night before election. Other methods to increase the public's positive attitude include word processing, which can personalize messages to target populations. Desktop publishing makes it possible for amateurs to produce a sophisticated-appearing brochure outlining issues. School financial campaigns must identify specific voter costs and positive results as well as convey the concept that the issue is good for students. Interaction between a well-articulated cause and a well-organized communication system wins elections. (CJH)

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WINNING STRATEGIES

HOW TO USE TECHNOLOGY TO WIN YOUR NEXT FINANCIAL ELECTION

Presented to:
AASA National Convention
Howard T. Heitzeg *
February 20, 1987

* Waterford School District
Waterford, Michigan

EA 019 314

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WINNING STRATEGIES
HOW TO USE TECHNOLOGY TO WIN YOUR NEXT FINANCIAL ELECTION

This discussion will center around the use of both new and old technologies in communicating election issues to the voting public. Amongst the newer technologies in the discussion will be desktop publishing, word processing, television tape and automatic telephone dialers. Also included will be some newer applications of the use of data processing files, the telephone and the interaction of computer files and word processing to bring about a new strategy for voting by mail. Public opinion sampling techniques are important tools to have at the disposal of the school election strategist. Effective application of surveying will also be examined.

Before there can be a discussion of the application of technology to a campaign, there has to be some groundwork presented to put the campaign in proper context. To put it another way, there must be an understanding of how campaigns are organized in Waterford to appreciate the appropriate application of technology to the strategies.

Waterford School District's campaigns have come to be known as the "Amway Plan". The "Amway Plan", for those of you who are unfamiliar with pyramid selling, is well-known in the consumer products area. The concept of pyramid selling is the same as the chain letter. The goal is to recruit as many people to sell your product for you as possible. That way you make a profit, not only on what you sell, but on what everyone else sells as well. In this case we're selling our cause and the currency is "yes" votes.

Here is a demonstration of how the pyramid sales concept may be applied to

elections. I need to contact ten people and convince them of the wisdom of a "yes" vote in an upcoming election. As important as convincing them to vote "yes" is to convince them to sell this wisdom to ten more of their friends and acquaintances. If they do this, my initial ten "yes" votes will multiply to one-hundred "yes" votes. If the one-hundred "yes" votes do the same job of convincing and recruiting, we have multiplied this concept into one thousand "yes" votes. It's at this point the numbers get pretty impressive. Sounds easy doesn't it? Well it is. Our strategy is to seek out and identify as many potential "yes" voters as possible and do everything we can to get them to the polls. Next we will focus on translating this concept into an action campaign, integrating appropriate technology in all phases.

Where are all the "yes" voters? The majority of the "yes" voters are those with a vested interest in quality education in a school district. Those that have the most vested interest, or at least the most obvious vested interest, are those adults who have young people attending school. Research does show that these people are the number one supporters. The next group of potential supporters are those people who have preschool children and, therefore, will be using the education system in the near future. Grandparents aren't exactly the "mother lode" but messages targeted toward them can convince them to vote "yes" or fail to vote "no".

So, the number one strategy is to point the campaign towards everyone who has children in school. Right? Wrong! The statistics in the Waterford area show that nearly one-third of parents with school age children are not registered to vote. Experience, over several years of voter registration campaigns, tells us it is very difficult to get citizens to register to vote if they have not

already done so. So let's not waste our time, postage money, and telephone money sending information and attempting to convince people who cannot even vote. Oh, we'll ask our workers to send them an application to register, but we won't spend an inordinate amount of time on voter registration.

"That's a good idea, we'll just separate those people who are registered to vote with children in school from those with children in school that are not registered to vote and target our campaign towards them." But this is an enormous problem. The voter registration files only contain the names, addresses and birthdates of the 50,000 voters in our community. It doesn't tell us if they have children, much less children in a public school. How do you sort through all of this data? One approach would be to recruit many people with the time to sit down with a list of all the names of students who attend school, and attempt to match them to the voter registration file. They would mark those that have children in school and are registered to vote. But, I wouldn't want to be in charge of that kind of project. Enter the use of data processing technology. If there is a computer system with a file with names, addresses and parents' names of all the students attending school, the computer can do one-half of the job. If a computer media (tape or disk) file of all the registered voters in the same community can be obtained, the computer can do all of this job for you. It does it very well. This list can be refined even further by keeping track of the voting history of all the people who are in the "endorsers" file. It can still be refined further to identify the person as a traditional school supporter or one who has not so declared themselves. Our computer file has now become very laden with information. It contains the endorsement status of the voter, ages of children in school, address, telephone number and voting history of everyone in the file. This computer file

information can then be summarized onto a card for every registered voter by simply printing it from the computer file. An example of this card is illustrated on the next page. The first position represents the elementary school attendance area in which the person lives. The 002 is the school number designated by the computer. The chairperson's and workers' roles we'll talk about a little bit later. The voter key is something the computer has to use that is not important for discussion here. The voter's name, address and city is labled number seven. The endorsement column shows the date the person was identified by a worker as a supporter of a campaign. Section eight shows the person's telephone number. Number nine shows the month and date of each of the elections that the voter has voted in; in other words, their voting record. Field number eleven shows the person's parental status. These designations indicate the schools where the voter's children attend. For example, if they have a student in elementary school and in senior high school there will be an "X" in both places. Field twelve is a place to "flag" a non-registered citizen. This field will be flagged indicating the worker should attempt to get the person registered, if a registration campaign is part of the election campaign. Field thirteen simply indicates the type of contact the worker made on this particular person and their feelings about the issues.

(1) ELEMENTARY ATTENDANCE: 002 ADAMS

(2) CHAIRPERSON_____

(3) WORKER_____

	ENDORSER	0429 ENDORSER
(4) VOTER KEY	(8) (313) 666-4000	(9) 0582 1183 1284 0485
(5) HOWARD HEITZEG	(10) MASON	(11) / / ELEM
(6) 6020 PONTIAC LAKE ROAD		/ / JR
(7) WATERFORD, MICHIGAN 48095		/ / SR
/ / PARENT		/ / GRADS
/ / ALUMNI		

(12) _____

ATTEMPT TO REGISTER THIS PERSON BY AUGUST 31

(13) ___PHONE ___HOUSE CALL ___MEETING ___YES ___NO

___UNDECIDED ___INFORMATION

Some of what has already been stated does not make a lot of sense since it has not been put in the context of a detailed campaign. Let us now explore the detail of the Waterford campaign strategy so the uses of technology can be explored further. Just like most campaigns, Waterford has a committee of citizens which is in charge of developing the overall strategy, approving the publications developed, and to raise the funds to support the campaign. As important as this central committee is, the very heart of the campaign is the regional groups.

The regional groups, or teams, are typically headed by three school administrators and the local elementary school secretary. It is the job of the teams to recruit citizens from the community around them, to create the necessary body of positive voters for their area, and to get them to the polls.

At this point it is necessary to pause and digress for a moment about how to arrive at the number of "yes" voters needed to win the election. First off, estimate the approximate number of voters who are going to be voting. This can be done by simply looking back through the history files. One would hope to identify twice as many "yes" voters as potential "no" voters in a campaign. For example, if a 12,000 voter turnout is expected, hopefully there will be 8,000 "yes" voters in the file.

Waterford assigns team quotas for "yes" voters using very unsophisticated arithmetic. Since there are 17 teams, we divide the number of supportive voters needed (8,000) by the number of teams (17). The quotient from this "goes into" problem is about 470. Let's round it to 500 voters per team. Now it is a pretty big chore for four people on a team to go out and identify 125 voters each, but if they manage to recruit another 30 or so people to their team and convince them to go out and locate another 15 "yes" voters each, the job is done. Fifteen times 30 is 450 which is very close to our target. A two-level Amway pyramid solves the problem if it is properly executed.

Well, how do you do this? Typically, the area team captain will call a meeting after recruiting teachers, other employees, and people from the community to be election workers. At this meeting, the election strategy and team responsibilities are explained to all of them. For this explanation we will use

another piece of technology, the television tape. This helps to standardize the message and to make the message as accurate as possible. We will also use a second television tape to explain to this group of 30 or so people the necessity for the election and what we hope to accomplish with the funds once the election is passed. Actually, we will use the explanation tape first. This takes a considerable amount of pressure off the area team. They only have to be knowledgeable enough to supplement the information on the two tapes; they don't have to be experts in school finance or election strategies in order to conduct the meeting.

The next step is to distribute all the cards from the endorser file of people who live in that community. Our emphasis is on a personalized campaign. People are encouraged to select the names of people they know and with which they have credibility. They are also encouraged to keep the same cards from election to election if the elections are close together. This helps maintain a continuity relationship, even among strangers. These cards will contain the names of people who have been identified as school supporters in past elections, or people who are registered to vote who are new to the community since the last election. Our computer can handle these kinds of things. The cards will be absent the names of the people who have moved out of the community since the last election. These cards, then, will be all <u>registered</u> voters, all have <u>children</u> in school and/or have been identified as positive voters in a recent election; they will have <u>voted</u> sometime in the last three years, or are <u>new to the community</u>. This is the "mother lode".

All campaigns are different, but the responsiblity for a typical worker on the bottom of the "Amway Pyramid" is embraced by the following tasks.

1. Contact everyone of the people for which they have a card. Engage them in a conversation about schools and the upcoming election. Don't ask directly, but attempt to determine from the conversation whether the person has knowledge of the election and if they have a tendency to support it.
2. The "yes" and "undecided" citizens will be mailed some information, probably a brochure, on the next day. Two days after the brochure is mailed they follow-up with another phone call to see if the person has any questions. At that point they decide if the person is a "yes" or "no" voter and so indicate on the card for that person.
3. They then call their chairman and indicate the names of the people who they have identified as "yes" votes for this election. The chairman then turns these names into data processing and they are entered into the computer system for use on election day.
4. The worker's final step is to make a telephone calls on the night before the election reminding people that tomorrow is election day and to please vote early if possible. At that point the "foot soldiers" work ends, although we do encourage them to do whatever is necessary to get the person to the polls. If they know of someone that needs a ride, give them a ride; if someone wants a wake-up call the next day, give them a wake-up call. Do whatever is necessary to get voters to the polls.

Election day is the busiest day of the entire campaign. Not only are the workers doing whatever it takes to get people to the polls, there also has to be a formal way of finding out who is voting and who isn't and to make one last

heroic attempt to get the positive voters to the polls. To achieve this end, volunteers are assigned to watch the voting all day long. They have a list of people for their voting precinct before them. These names are the names of people identified by the area teams as supporters of the election. Approximately three hours before the polls are closed the names and phone numbers of the positive voters are gathered together and taken to central telephone calling banks. All the people who have not voted, at that point, receive still one more phone call reminding them that today is election day and will they please go vote.

The most effective campaigns are citizen led and staff supported. This is true for many reasons, including the meeting of legal requirements for campaigning. In Michigan, statutes require that no public monies be spent to influence the outcome of an election. Therefore, the citizens' committee forms a very important function in fund-raising. These funds can be expended for the normal expenses of the campaign. This does not mean that the production and mailing of all information must be funded from other sources. The school district has the responsibility to inform the electorate of the election issues. Such things as flyers and brochures, which only outline the issues at hand but do not state explicitly to vote "yes" in the campaign, are all legitimate obligations of the Board of Education. The staff can only participate in the influencing portion of the campaign on their discretionary time, but, once again, it is staff's obligation to inform citizens of the issues at hand. Sometimes it appears difficult to discriminate between information and influence. It is advised to make the most conservative interpretation of these issues to avoid even the appearance of illegality.

The vote by mail alternative is a technique I learned from the Republican Party in the 1980 presidential election. They used their technology to sort through the mailing lists obtained from American Express, Visa, and MasterCard for people in the income bracket they felt were high probability Republicans. They then sent a generic application for an absentee ballot that was "prefilled out" for the person. All the individual had to do was sign it and send it to their local election clerk. The Waterford vote-by-mail alternative is a refinement of this technique. We complete the absentee voter application for the people from our endorsers file. We then instruct the teams to mail this to all of the people they have contacted who are endorsers. Please note that we are not actually mailing them the ballot, which is against the law in our state; we are mailing them an application for an absentee ballot that they may use or not use at their discretion. We dramatically increased the numbers of people who used the absentee ballot and the nature of the absentee vote. Traditionally, the absentee vote was negative. In recent elections it has become a source of positive votes. This is not to imply that we have changed the vote of those that were voting no, it is just that the absentee votes we are now getting are yes votes that we might not have gotten otherwise.

Word processing can be used year-round to increase the positive attitude of the public we serve. In the election itself, it can be used to personalize messages to target populations through the use of merging the mailing address and name with a standardized letter. We use word processing in elections to personalize messages to special interest groups from a creditable source. An example of this would be to personalize a letter to all "band boosters" from the band teacher outlining the importance of an election to the music program. Other special interest groups that we target this way are athletic boosters,

parents of gifted and talented students, and, really, the parents of any group that receives special treatment by the school program. An ideal goal would be to make every member of the electorate a special interest about something. During the school year we use word processing to personalize congratulatory messages from the superintendent to students who have been outstanding in someway. Annually, the superintendent sends a personal letter, signed by him, to the parents of the students who graduate in the spring. He also sends letters to parents of students who receive high scores on state assessment tests and meet the minimum standards in the Waterford Certification of Basic Skills program. I believe that word processing may be the most important invention since the printing press.

Telephone dialers are another piece of technology that can be used for personalizing a recorded message to target audiences. Unlike word processing, the receiver of the message knows it is not personal, that a computer is calling. For this reason, caution in selecting messages is advised to avoid offending the receivers. We use telephone dialers to call the parents of students who are missing school. Surprisingly, parents are not offended by this practice. The Republican Party used this technique to personalize a message to likely Republican voters in their past election. They were attempting to save the Senate from the Democrats. The results of the use of this technique indicates this is not necessarily a total solution for winning elections. I believe the "court is still out" on how effective this technology can be to persuade anyone. Waterford uses it simply to telephone people to remind them "today is election day and please remember to vote". This message, of course, is targeted towards those people who are likely positive voters.

Desktop publishing is still another of the emerging technologies having application to school elections. It is a very new technology and is very exciting. It makes it possible for amateurs to produce very sophisticated appearing published products. It can improve both the quality and quantity of the brochure production that is a part of the election. Every election, as you know, has to have at least one standard brochure outlining the issues. The "snappiness" of this presentation is probably as important as the message it carries. I have included here an example that was published for a fire millage election in our community. Even it is primitive by comparison to the kinds of documents that are readily available and are going to be increasingly available to all of us. Of course, this technology, as are all of them, has even further implications for the kinds of things that we do year-round.

YOUR

YES

VOTE

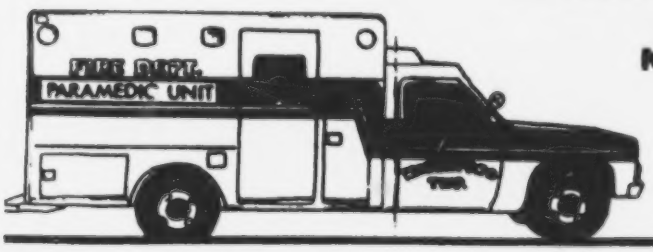
A ONE MILL INCREASE WILL:

- Add a second paramedic Life Support Unit.
  - Because of increased demand, our one life support unit is unable to respond to all the residents needs. A second unit would insure better coverage and could mean the difference between life and death.
- Add a second Primary Fire Fighting Crew.
  - To aid at a fire scene and rescue trapped victims.
- Purchase an aerial ladder truck.
  - Currently, we do not have one. Creating a hazardous situation for some of the new structures in Waterford.
- Add a trained hazardous material team.
  - Many hazardous materials are transported through the township each day by rail, highway and air. It is critical to be able to respond effectively and quickly to this potential hazard.
- Add a trained water rescue team.
- Repair and remodel old/obsolete fire stations.
- Increase Fire Protection for you and your family 24 hours a day, 365 days a year.

WATERFORD TOWNSHIP FIRE FIGHTERS

NEED YOUR SUPPORT

VOTE AUGUST 5th, 1986



The community survey is the final application of technology to elections I will discuss. If surveys are employed they need to be done well before the election. Survey information can help strategists focus in on the critical issues of the campaign. The information can yield an estimate of how well the issue will be received in the community.

Ideally, everyone who is going to vote on election day will be included and all of those who will not vote on election day will be excluded. Obviously, this ideal is neither possible nor practical. It is not possible because no one knows exactly who is going to vote on election day, nor practical, since usually there are not the financial or human resources to survey everyone in the community.

Modern sampling techniques have made it possible to efficiently obtain very close estimates of the moods of large populations. We are all familiar with the national elections being "called" before the polls are even closed. Often this "call of the election" is based on less than one-percent of the vote. This is done through the identification of key precincts. These precincts have been observed over long periods of time and the voter trends have been plotted. The resultant vote in the key precincts can be interpolated to the population at large in order to estimate the election result as a whole.

Waterford's fourth precinct is a key precinct. Over the recent history of elections in Waterford, the results at this precinct has very closely matched the total outcome of all precincts taken together. Therefore, to check the mood of "likely voters", we select a random sample of citizens from this precinct who have voted in at least one of the last three financial elections. We then telephone them and, through a series of questions, determine their

attitudes toward the issues at hand. We have used this method successfully to identify issues and to monitor the effects of our campaign strategies over time. Just like they do in the "big time", we mail out a piece of campaign material and immediately follow-up with another survey to measure its affect. This also give us an estimate of the size of the task at hand; an estimate of the numbers of voters who must be swayed from "no and undecided" to "yes". Modern sampling techniques, when used with scientifically designed surveys, can be a very important tool in developing the election strategy and monitoring the mood of the electorate.

In conclusion, there are some caveats about elections that I have learned over the years. The first is you must have a good cause. Now, presumably in our business all of the financial elections we have go to help kids. Certainly this is an undeniably good cause; but it is not always obvious to citizens that these good things are going to happen. What I mean is that it is necessary to identify, specifically, what will happen to the kids in the community if this election passes. Secondly, "sell the sizzle, not the steak". It is still necessary to have information available about, "How much this is going to cost me per day if this election passes?" It is also necessary to identify the text books that are going to be bought or the programs that are going to offered kids because of the passage of this issue. But the most important thing sold is "this is good for kids", "pride in community" and "wise expenditures of citizens' funds". Find a campaign theme and message with an abundance of sizzle. Make it short and understandable. And finally, if the first two are not in place the campaign is akin to rearranging the deck chairs on the Titanic. Well-organized mediocrity is a possibility in any endeavor. It is the interaction between a well-articulated cause and a well-organized communication system that wins elections.